

Construction Review

Reflecting activity to the end of August 2025

September 2025

- ✓ **48% decrease in detailed planning approvals**
compared with the last quarter
- ✓ **24% decrease in main contract awards**
relative to the prior three-month period
- ✓ **22% decrease in project starts** during
the most recent quarter



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Community & Amenity

Civil Engineering

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to drive your construction strategy forward

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Led by Allan Wilen, a construction industry expert with over 30 years of market analysis experience, our team provides extensive expertise on the UK construction and built environment markets. Allan, previously Economics Director at the Construction Products Association for 20 years, offers valuable insights and in-depth analysis. He is supported by seasoned economists Yuliana Ivanykovych and Drilon Baca, who enable businesses to make informed strategic decisions through rigorous research and analysis.

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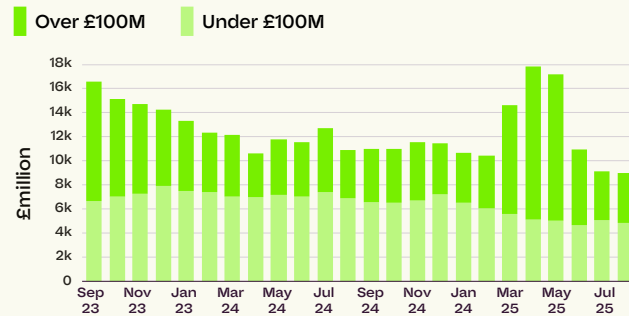
Executive Summary

- ✓ **17% decrease** in detailed planning approvals compared with the previous year
- ✓ **33% decrease** in main contract awards year-on-year
- ✓ **36% decrease** in project starts against the same period last year

The latest figures show a clear slowdown in construction, with project starts, main contract awards and planning approvals all down on both the previous quarter and the same period last year. Weakness spans projects of all sizes, with major and underlying schemes both affected.

The residential sector has been hit hardest, compounding wider market pressures. Sluggish economic growth, hiring freezes and rising unemployment are weighing on activity, pointing to a challenging near-term outlook for the industry.

Detailed Planning Approvals

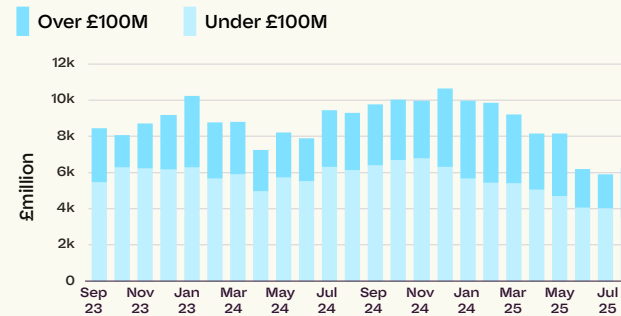


Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£million	14,451	12,482	26,933
YoY	-30%	5%	-17%
Prev. 3 months	-4%	-66%	-48%
Prev. 3 months (SA)	-2%		

Source: Glenigan. Three month average

Main Contract Awards

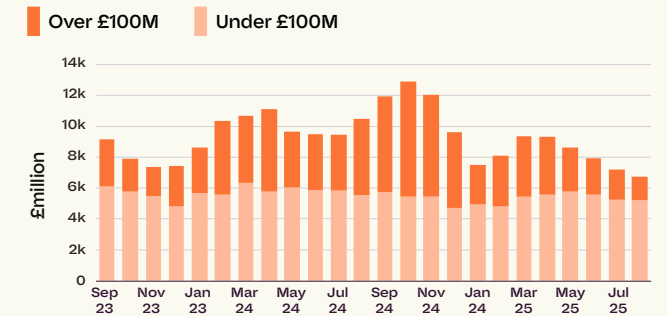


Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£million	10,494	8,151	18,645
YoY	-43%	-14%	-33%
Prev. 3 months	-26%	-21%	-24%
Prev. 3 months (SA)	-19%		

Source: Glenigan. Three month average

Starts



Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	15,605	4,639	20,245
YoY	-6%	-69%	-36%
Prev. 3 months	-10%	-46%	-22%
Prev. 3 months (SA)	-4%		

Source: Glenigan. Three month average

Economic Outlook

Improved consumer spending helps lift UK economic growth

- ▲ Service sector supporting increased UK growth
- ▲ Higher retail spending points to improving consumer confidence
- ▼ Economic uncertainty constrains the pace of recovery

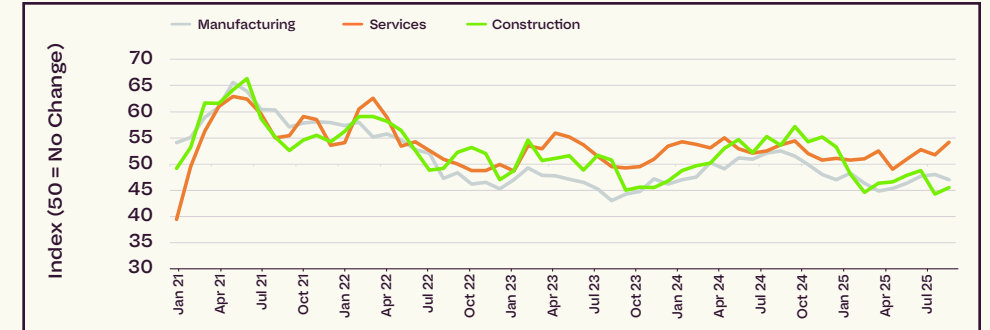
Consumer and business confidence are improving, though economic uncertainty continues to weigh on recovery. The UK economy grew 0.4% in June after two months of decline, reflecting concerns over US tariffs and rising labour costs.

Industry surveys point to ongoing weakness in manufacturing and construction, while services expanded. Employment remained weak due to higher payroll costs. The ONS Business Insights survey in August found uncertainty was the most common challenge, affecting turnover at a quarter of firms, while labour costs were the main issue for larger employers and hospitality.

Consumer confidence also remains fragile, with the GfK index at -17 in August, driven by negative views of the broader economy. However, expectations for personal finances improved, helping retail sales in recent months.

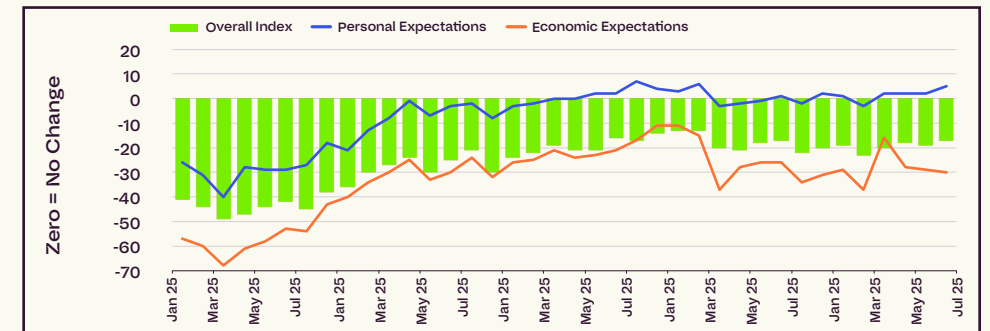
Retail sales volumes rose 0.5% in July, led by non-food stores and online channels. Online sales were up 2.5% on the month and 5.2% year-on-year. If sustained, this shift in spending should support demand in retail and logistics construction.

CIPS Activity Surveys



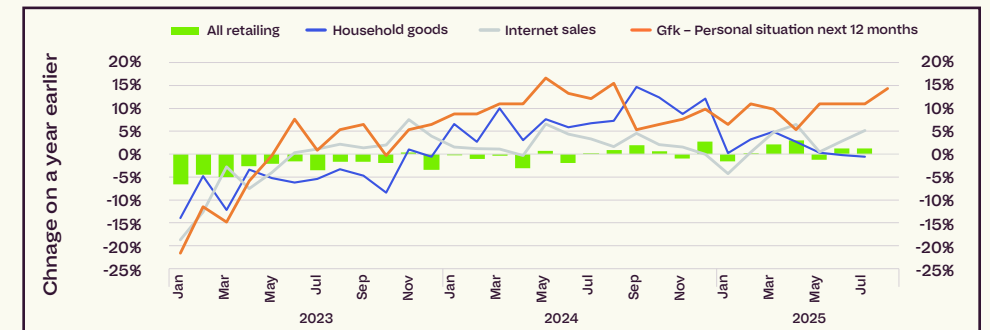
Source: S&P Global PMI

Consumer Confidence



Source: GfK Consumer Confidence Barometer

Retail Sales



Source: ONS

Top 50 Contractors

Last 12
month
totals:

972 projects
£41,528m

Last
month
totals:

92 projects
£6,300m

September 2024 to August 2025

Contractors	#	£m	★	Contractors	#	£m	★
1 STRABAG	5	2900	NEW	26 Multiplex	2	550	-1
2 Kier	93	2459	-1	27 McAleer & Rushe Contracts	8	537	-3
3 Mace	14	2417	2	28 Tilbury Douglas	37	454	4
4 Laing O'Rourke	11	2326	-2	29 Kanadevia Inova UK	2	450	-2
5 Royal BAM	35	2126	-2	30 John Sisk & Son	6	414	-1
6 Morgan Sindall	210	2088	-2	31 G W Highways	1	400	-1
7 Balfour Beatty	41	1758	10	32 ACCIONA	1	400	-1
8 Ferrovial	3	1617	-2	33 VINCI	32	388	0
9 Sir Robert McAlpine	4	1569	-2	34 Caddick Group	10	371	0
10 Bowmer & Kirkland	30	1524	0	35 Siemens	6	353	0
11 Graham Construction	24	1216	-3	36 Enka	1	350	0
12 Ringway Group	3	1159	-1	37 Gilbert Ash	7	287	0
13 Bouygues	26	1008	3	38 Vistry	9	268	4
14 M Group Services	12	925	-1	39 Aecon	1	250	0
15 Winvic	19	907	-6	40 Zenobe Energy	1	220	5
16 McLaren	19	888	2	41 HG Construction	7	218	NEW
17 Bovis	4	888	3	42 G2 Design	1	216	5
18 Wates	40	871	-3	43 Cfield Construction	3	203	-3
19 Costain	4	859	0	44 Clark Contracts	31	203	NEW
20 Mears Group	5	800	-6	45 RG Group Ltd	3	201	5
21 McLaughlin & Harvey	11	778	0	46 Marshall Holdings	5	200	NEW
22 Willmott Dixon	41	766	0	47 Castle Building Services	3	194	NEW
23 Galliford Try	106	724	-11	48 Legendre Construction	4	191	NEW
24 TSL Projects	6	666	4	49 Robertson	20	184	-5
25 JRL Group	3	604	-2	50 Bennett Construction	2	183	NEW

★ Change in ranking since the previous period

August 2025

Contractors	#	£m	★	Contractors	#	£m	★
1 STRABAG	5	2900	NEW	26 Kori Construction	2	26	NEW
2 Mace	1	700	NEW	27 A & H Cons. & Developments	1	24	NEW
3 Bowmer & Kirkland	5	332	-1	28 J W Muir Group	2	23	NEW
4 McLaren	2	240	1	29 Community Wind Power	1	20	NEW
5 Bovis	1	238	NEW	30 Esh Group	1	18	-11
6 Bouygues	3	231	NEW	31 Galliford Try	4	17	-5
7 Morgan Sindall	11	229	10	32 Bell Decorating Group	2	17	NEW
8 McLaughlin & Harvey	3	204	30	33 Team Van Oord	1	16	NEW
9 Bennett Construction	1	116	NEW	34 ETM	1	16	NEW
10 Willmott Dixon	6	82	NEW	35 SER Contractor	1	15	NEW
11 PMC Cons. & Development	1	69	NEW	36 Kelly Brothers Building	1	15	NEW
12 Tilbury Douglas	5	67	6	37 C Spencer	1	14	NEW
13 Farrans Construction	1	59	NEW	38 T Brown Group	1	14	NEW
14 HG Construction	1	57	NEW	39 Gilmartins	1	14	NEW
15 Gobion Construction	1	50	NEW	40 Purdy Contractors	1	14	NEW
16 Winvic	1	49	NEW	41 Axis Group UK	1	14	1
17 Balfour Beatty	1	47	-10	42 Neilcott Construction	1	14	NEW
18 McAleer & Rushe Contracts	1	43	-10	43 Pentaco Construction	1	13	NEW
19 Reds10 (UK)	1	36	NEW	44 Breheny Civil Engineering	1	11	NEW
20 Henry Group	1	32	0	45 Royal BAM	1	11	-22
21 CLC Group	1	30	NEW	46 Lane Rental Services	1	10	NEW
22 Laing O'Rourke	3	30	-21	47 Excalon	1	10	NEW
23 Integral UK	1	29	NEW	48 Boutique Modern	1	10	NEW
24 Vistry	1	29	NEW	49 The Shanly Group	1	8	NEW
25 Seddon Group	1	29	NEW	50 Borrás Group Holdings	3	8	NEW

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Top 50 Contractors

Top 50 Clients

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Health

Education

Community & Amenity

Civil Engineering

Top 50 Clients

September 2024 to August 2025

Clients	#	£m	★
1 Department for Transport	51	4825	0
2 United Utilities Group	5	2900	NEW
3 Department of Health	154	1802	-1
4 Tata Steel Group	2	1254	-1
5 Hertfordshire C. Council	3	1159	-1
6 SSEN Transmission	11	1153	NEW
7 Oxfordshire County Council	9	1016	-2
8 Dep. for Env., Food & Rural	4	942	-2
9 Ministry of Defence	42	770	3
10 National Grid	7	722	-2
11 The British Library	1	700	NEW
12 Scottish Prison Service	4	685	-3
13 Ministry of Justice	29	674	-3
14 British Land	3	634	-3
15 Department for Education	70	607	-8
16 Tritax Group	5	507	-1
17 Kingsway Solar Farm	1	500	-1
18 GE Hitachi Nuclear Energy	1	500	-1
19 Milton Keynes Bor. Council	3	487	-1
20 Kent County Council	8	486	0
21 Kemble Water	4	420	-2
22 Ciner Glass	1	390	1
23 Dover District Council	2	360	1
24 University of London	12	320	15
25 University of Glasgow	2	301	1

Clients	#	£m	★
26 MVV Environ. Devonport	1	300	1
27 Mitsubishi Estate London	1	300	1
28 Marriott International	1	300	1
29 North Lanarkshire Council	13	297	-15
30 Lidl UK	45	281	NEW
31 MEC London Property	1	250	1
32 Co-re	1	250	1
33 Anchor Housing	3	233	2
34 C1 Capital	1	225	2
35 Frogmore Real Estate	1	225	2
36 Elements Green	1	216	4
37 Network Rail	25	213	-7
38 London Bor. of Havering	3	209	4
39 CPD	6	208	-17
40 Natural History Museum	2	204	3
41 The City of Cardiff Council	11	203	0
42 Aviva Staff Pensions Trustees	1	200	2
43 JTRE London	1	200	3
44 Southwark Charities	1	200	3
45 Havisham Sarl	1	200	0
46 Urenco UK	2	196	2
47 Clarion Housing Group	5	187	3
48 Associated British Ports	2	183	1
49 Home Office	21	177	-11
50 City of Edinburgh Council	13	172	NEW

August 2025

Clients	#	£m	★
1 United Utilities Group	5	2900	NEW
2 The British Library	1	700	NEW
3 Department of Health	8	209	17
4 Midlothian Council	1	120	NEW
5 Ministry of Defence	7	114	NEW
6 University of London	2	104	NEW
7 Reuben Brothers	1	83	6
8 HM Revenue & Customs	1	83	NEW
9 University of Cambridge	2	75	NEW
10 Vivid Housing	1	69	NEW
11 Legal & General Group	1	60	NEW
12 Renfrewshire Council	2	59	23
13 London Gateway Port	1	50	NEW
14 Elysian Residences	1	43	NEW
15 V2C	1	42	NEW
16 Leeds City Council	3	41	NEW
17 Coleg Gwent	1	39	NEW
18 Queens University Belfast	1	32	NEW
19 Countryside Properties	1	29	NEW
20 Together Housing Group	1	29	NEW
21 Interface-TM	1	25	NEW
22 MFP (WL) Coventry	1	25	NEW
23 Panattoni UK Developments	1	25	NEW
24 Benacre Farms	1	24	NEW
25 Waveney, Lower Yare and Lothingland	1	24	NEW

Clients	#	£m	★
26 Bluefield Renewable Dev.	1	23	NEW
27 Marussia Beverages	1	22	NEW
28 Redstone Rig Storage	1	20	NEW
29 Square Bay (Bath)	1	19	NEW
30 Studio HIVE	1	19	NEW
31 St Vincents	1	19	NEW
32 Sheffield City Council	1	18	NEW
33 Swansea University	1	17	NEW
34 Hampton Care	1	17	NEW
35 Brighton & Hove Council	1	16	NEW
36 K P Snacks	1	16	NEW
37 S & W Wholesale	1	15	NEW
38 University of Hertfordshire	1	14	NEW
39 Glasgow City Council	2	13	NEW
40 Bauder	1	12	NEW
41 Park Holidays UK	1	12	NEW
42 Kent County Council	1	11	NEW
43 North Somerset Council	2	11	NEW
44 Caerphilly County B. C.	1	11	NEW
45 Scottish Power Energy	1	10	NEW
46 Eastbourne B. C.	1	10	NEW
47 Avery Healthcare Dev.	1	9	NEW
48 Beech Lodge School	1	8	NEW
49 The City of Cardiff Council	2	8	-40
50 Barcud Shared Services	1	8	NEW

★ Change in ranking since the previous period

Glenigan Index

Construction starts under £100 million experienced a weak period in the three months to August, with a poor performance in residential holding back overall growth.

- The value of underlying work (under £100 million) starting on-site during the three months to August **declined 4%** and remained 6% below 2024 levels.

Sector Analysis

	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
Residential	6,709	-25%	-18%	-16%
Industrial	1,382	4%	1%	-11%
Offices	2,292	90%	103%	232%
Retail	321	-21%	-23%	-34%
Hotel & Leisure	874	9%	-5%	4%
Education	1,138	10%	-14%	-37%
Health	740	14%	7%	-5%
Community & Amenity	480	-35%	-26%	35%
Civil Engineering	1,671	-23%	2%	-22%
Total	15,605	-10%	-4%	-6%

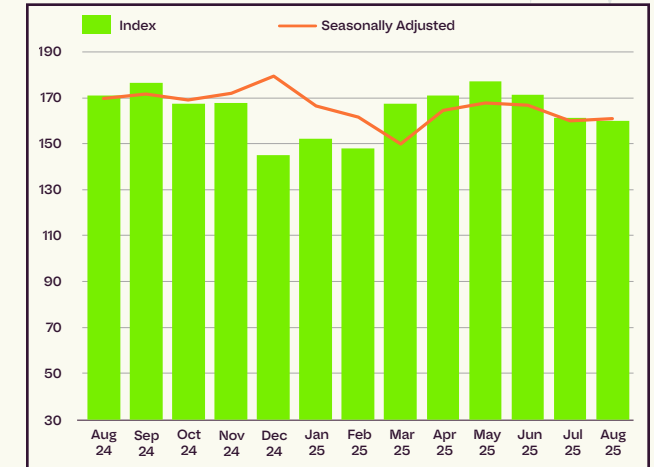
- Residential construction starts **declined 18%** on the preceding three months and **declined 16%** against 2024 figures.
- Non-residential project starts **increased 13%** against the preceding three months to stand 11% up on a year ago.
- Civils work starting on-site **increased 2%** against the preceding three months but **decreased 22%** against the previous year.

Regional Analysis

	Index	Prev. 3 months	Prev. 3 months (SA)	YoY
East of England	1,552	-3%	-9%	7%
East Midlands	844	-45%	-36%	-37%
London	2,973	52%	39%	36%
North East	853	34%	29%	61%
North West	1,457	0%	-5%	-12%
Northern Ireland	551	68%	38%	-8%
Scotland	1,151	-23%	-16%	-29%
South East	2,014	-18%	-15%	-21%
South West	1,354	-36%	-29%	-32%
Wales	462	-34%	-20%	-17%
West Midlands	1,382	9%	21%	36%
Yorkshire & the Humber	1,012	-41%	-28%	-14%

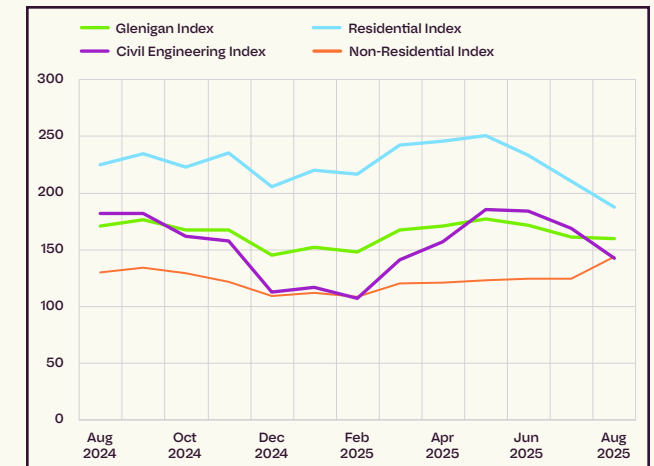
N.B. Index 2006 =100

Glenigan Index



Source: Glenigan

Indices Growth



Source: Glenigan

Housing

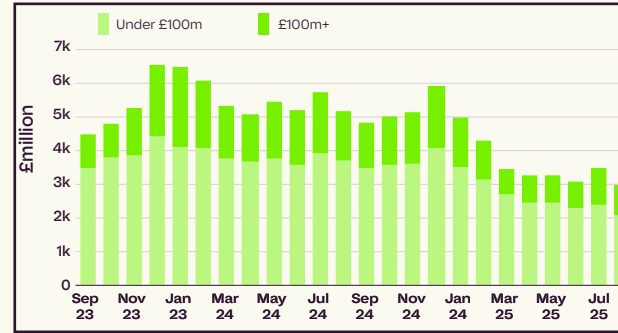
Overview

- ✓ **10% decrease** in project starts year-on-year.
- ✓ **44% decrease** in main contract awards from last year.
- ✓ **42% decrease** in detailed planning approvals compared to 2024.

Residential project starts, contract awards and detailed planning approvals all experienced a decline against both last year and the preceding quarter during the three months to August, mainly caused by the Private Housing Sector. More positively, Social Housing starts and consents grew against the previous quarter.

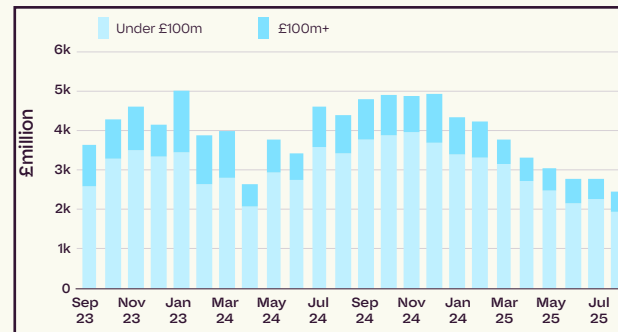
The sector has been experiencing a persistent period of decline since the stamp duty increase.

Detailed Planning Approvals



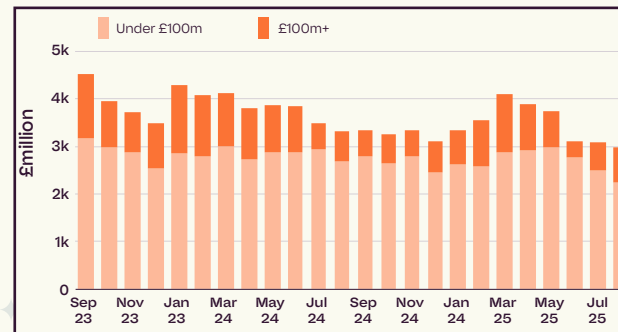
Source: Glenigan

Main Contract Awards



Source: Glenigan

Housing Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	6,227	2,759	8,986
YoY	-44%	-37%	-42%
Prev. 3 months	-16%	15%	-8%
Prev. 3 months (SA)	-18%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	5,823	1,561	7,384
YoY	-43%	-46%	-44%
Prev. 3 months	-22%	-7%	-19%
Prev. 3 months (SA)	-14%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£million	6,709	2,263	8,972
YoY	-16%	18%	-10%
Prev. 3 months	-25%	-2%	-20%
Prev. 3 months (SA)	-18%		

Housing

Types of projects started

In line with the overall decline of the sector, only two categories experienced growth in project starts.

- Private housing accounted for the largest share (44%), having decreased 11% year-on-year to total £3,916 million.
- Student accommodation more than doubled against the previous year, totalling £1,064 million.
- Totalling £1,722 million, private apartments starting on site fell 31% on a year ago.

Types of Housing Projects Started

Three months to July 2025

	£ million	Percentage
Private Apartments	1,722	19%
Elderly Persons Homes	-	0%
Private Housing	3,916	44%
Private Sheltered Housing	133	1%
Social Sector Sheltered Housing	109	1%
Social Sector Apartments	502	6%
Social Sector Housing	1,523	17%
Homes, Hostels Etc.	2	0%
Student Accommodation	1,064	12%
Total	8,972	100%

Project Spotlight

Hulme Street Student Flat Development

Detailed plans have been approved for the £158 million “Street Student Flat Development. A main contractor is yet to be appointed on the scheme, with works due to be completed in Q2 2030.

PROJECT ID: 25025910

IMAGE SOURCE: TIM GROOM ARCHITECTS

£158m



Housing League Tables

August 2024 to July 2025

Contractors	Projects	£m
Morgan Sindall	152	3,030
Wates	87	2,253
Bouygues UK	71	1,858
Mears	19	1,841
Willmott Dixon	69	1,718
Vistry	55	1,626
JRL	18	1,597
Graham Construction	30	1,580
HG Construction	33	1,467
Winvic	18	1,306

Clients	Projects	£m
Barratt Redrow	86	2,227
Persimmon	93	1,977
Taylor Wimpey	67	1,851
Vistry	64	1,589
Bloor Homes	40	1,442
Bellway	48	1,097
Milton Keynes BC.	5	733
Hill Group	13	681
Berkeley DeVeer	22	558
Crest Nicholson	15	501

Housing

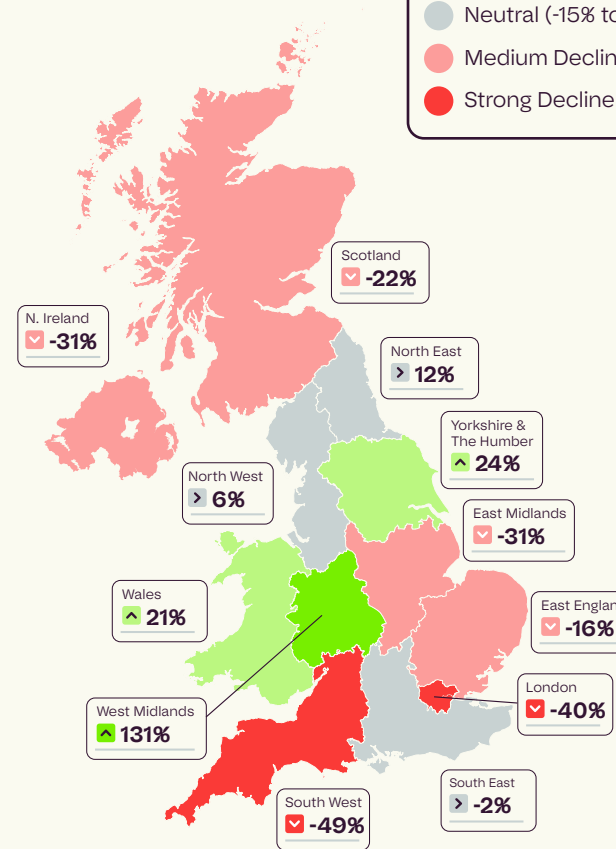
Regional

- Most regions experienced a decline in project starts.
- Regional performance was especially weak for detailed planning approvals, with only two regions up year-on-year.
- The West Midlands experienced the sharpest growth in project starts.

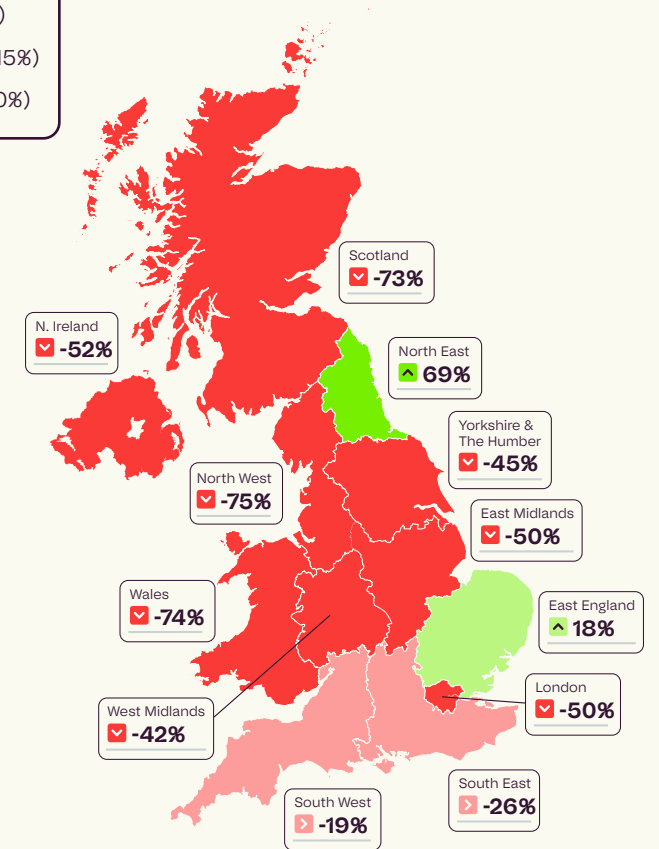
The South East accounted for the largest share of sector starts (19%), despite this the region experienced a 2% decline against the previous year. The West Midlands at £1,025 million experienced the sharpest rise (+131%) of any region, accounting for 11% of the total value.

The South East was the most active region for detailed planning approvals, accounting for 18% of the total value. The region declined 26% against the previous year. At £1,551 million, the East of England accounted for the second largest share (17%) of the total value. The region experienced a modest 18% rise against the previous year.

Changes in Housing Starts
on a Year Earlier



Changes in Housing Planning Approvals
on a Year Earlier



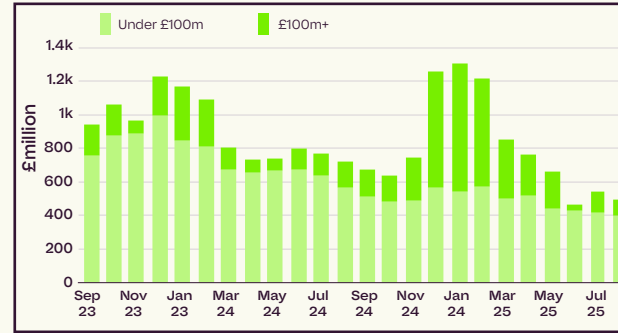
Industrial

Overview

- ▼ **4% decrease** in project starts year-on-year.
- ▼ **58% decrease** in main contract awards from last year.
- ▼ **32% decrease** in detailed planning approvals compared to 2024.

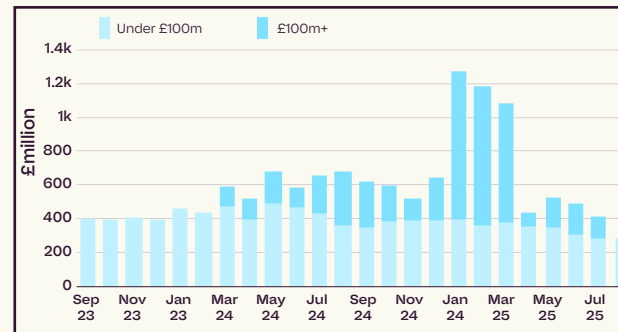
Performance in the industrial sector was weak during the three months to August. Starts were 4% down on a year ago and 10% lower than the preceding three months. Main contract awards were 46% lower than the preceding quarter, to stand 58% down year-on-year, with no major projects (£100 million or more) awarded. Detailed planning approvals also fell against both periods.

Detailed Planning Approvals



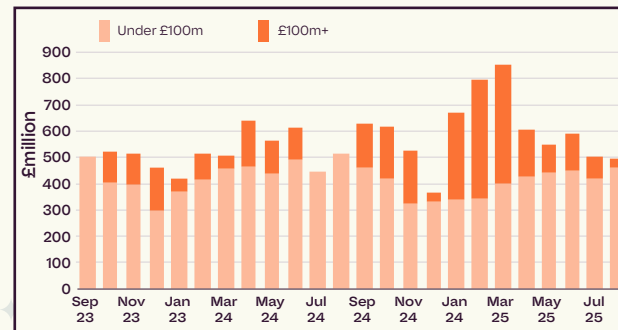
Source: Glenigan

Main Contract Awards



Source: Glenigan

Industrial Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	1,195	281	1,476
YoY	-30%	-40%	-32%
Prev. 3 months	-9%	-59%	-26%
Prev. 3 months (SA)	-16%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	852	-	852
YoY	-21%	-100%	-58%
Prev. 3 months	-19%	-100%	-46%
Prev. 3 months (SA)	-16%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,382	100	1,482
YoY	-11%		-4%
Prev. 3 months	4%	-69%	-10%
Prev. 3 months (SA)	1%		

Industrial

Types of projects started

Despite the overall weak performance of the sector, project starts grew in two out of three categories.

- Warehousing & logistics accounted for 66% of industrial project starts, 70% up on a year ago to total £974 million.
- Totalling £108 million, other industrial projects accounted for 7%, a 4% increase.
- Manufacturing fell 54% year-on-year, totalling £400 million, a 27% share of the sector.

Types of Industrial Projects Started

Three months to July 2025

	£ million	Percentage
Manufacturing	400	27%
Other Industrial	108	7%
Warehousing & Logistics	974	66%
Total	1,482	100%

Project Spotlight

SPARK Phase 2

Detailed plans have been approved for the £188 million SPARK Phase 2 development in Walsall. A main contractor is yet to be appointed on the scheme with works due to be completed in Q3 2026.

PROJECT ID: 25195962

IMAGE SOURCE: BE NEWS

£188m



Industrial League Tables

August 2024 to July 2025

Contractors	Projects	£m
Newarthill	1	1,250
TSL Projects	5	635
Winvic	11	555
McLaughlin & Harvey	2	462
Enka	1	350
McLaren	9	327
Bowmer & Kirkland	3	236
Marshall Holdings	3	193
Caddick	8	183
Magrock	10	135

Clients	Projects	£m
Tata Steel	1	1,250
Tritax Group	6	590
Ciner Glass	1	390
Lidl UK	2	152
BMW (GB)	1	130
Watts Solar	1	126
Lond. Gateway Port	2	122
CP Logistics UK	2	120
Marshall Holdings	2	95
Prologis UK	4	93

Industrial

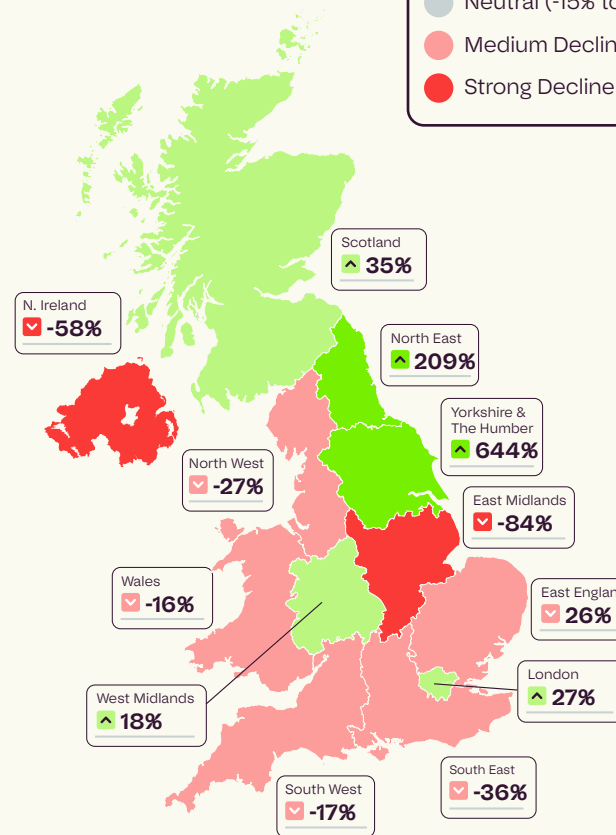
Regional

- Regional performance in project starts was mixed.
- Only three regions grew in detailed planning approvals.
- The North East had a strong performance in both project starts and approvals.

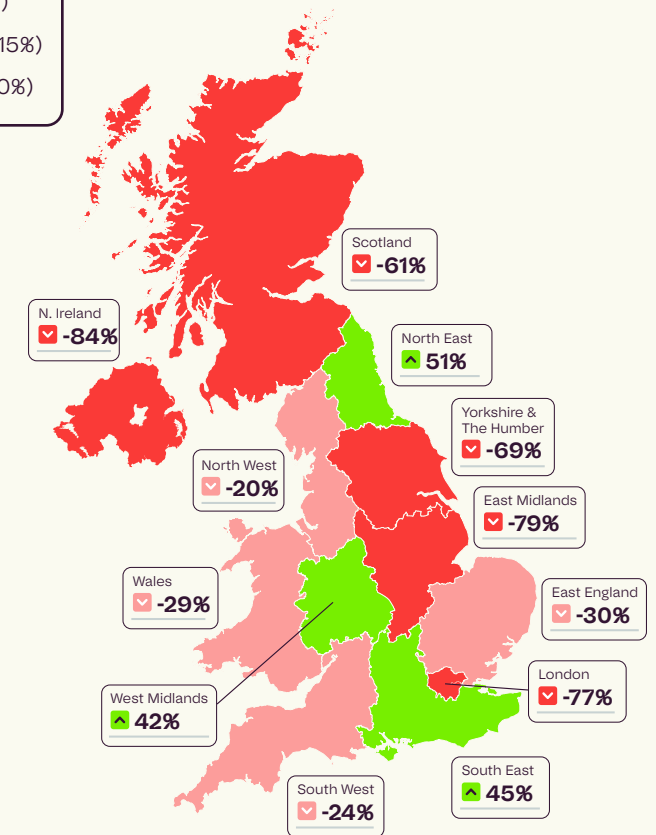
The West Midlands led project starts in the industrial sector, thanks to 18% growth on a year ago, totalling £220 million. Yorkshire & the Humber also jumped more than seven times, totalling £219 million. Activity in the region was boosted by the £100 million Shipley Train Care Depot.

The South East accounted for 28% of detailed planning approvals, totalling £410 million. The region grew 45% on a year ago, boosted by the £257 million PLP South Coldecotte, Milton Keynes Phase 2 Zone 2 Unit 11 development. Accounting for 18%, approvals in the West Midlands also increased 42%, totalling £273 million. In contrast, the East of England fell 30% to total £210 million.

Changes in Industrial Starts
on a Year Earlier



Changes in Industrial Planning Approvals
on a Year Earlier



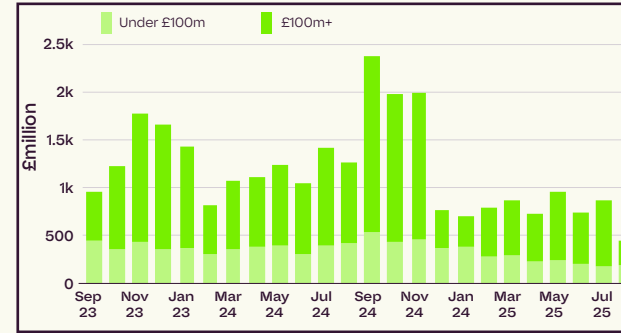
Offices

Overview

- ▲ **125% increase** in project starts year-on-year.
- ▼ **15% decrease** in main contract awards from last year.
- ▼ **65% decrease** in detailed planning approvals compared to 2024.

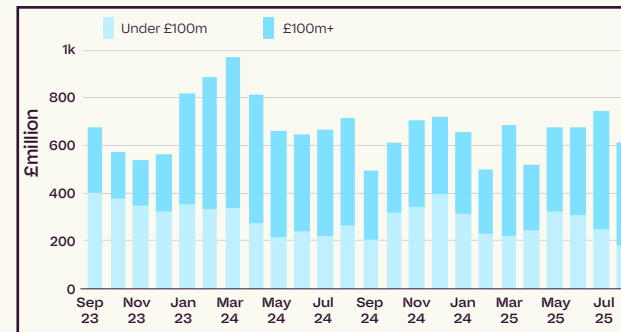
The office sector experienced a mixed performance during the three months to August, with a decline in main contract awards and detailed planning approvals against both the previous three months and a year ago. However, project starts grew strongly, boosted by a sharp increase in underlying starts (under £100 million).

Detailed Planning Approvals



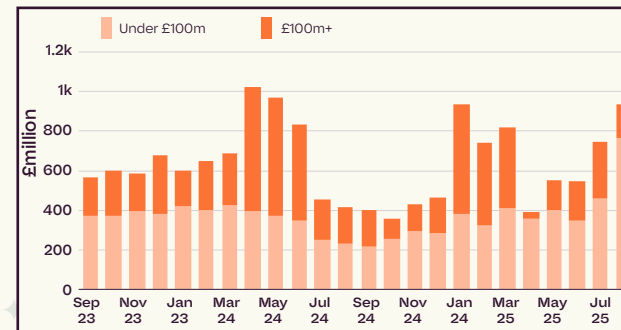
Source: Glenigan

Main Contract Awards



Source: Glenigan

Office Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	561	779	1,341
YoY	-56%	-69%	-65%
Prev. 3 months	-22%	-64%	-53%
Prev. 3 months (SA)	-22%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	542	1,290	1,832
YoY	-31%	-5%	-15%
Prev. 3 months	-44%	20%	-10%
Prev. 3 months (SA)	-48%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	2,292	515	2,806
YoY	232%	-7%	125%
Prev. 3 months	90%	14%	69%
Prev. 3 months (SA)	103%		

Offices

Types of projects started

In line with the overall growth in the sector, most value bands experienced growth in project starts.

- Project starts in the £20 million to £50 million value band totalled £860 million, having quadrupled on a year ago.
- The £50 million to £100 million value band jumped 374% year-on-year, totalling £664 million.
- The over £100 million value band fell 7% year-on-year, totalling £515 million.

Types of Office Projects Started

Three months to July 2025

	£ million	Percentage
Up to £5 million	252	9%
£5 million up to £10 million	203	7%
£10 million up to £20 million	313	11%
£20 million up to £50 million	860	31%
£50 million up to £100 million	664	24%
Over £100 million	515	18%
Total	2806	100%

Project Spotlight

Iver Heath Data Park

Detailed plans have been approved for the £259 million Iver Heath Data Park development in Iver, Buckinghamshire. Work is due to completed in Q3 2028, with a main contractor yet to be appointed on the scheme.

PROJECT ID: 22276695

IMAGE SOURCE: APT

£259m



Office League Tables

August 2024 to July 2025

Contractors	Projects	£m
Mace	7	1,415
Morgan Sindall	120	1,005
Multiplex	2	550
JRL	2	475
Bovis	1	330
McLaren	3	265
Bowmer & Kirkland	3	225
Wates	14	222
Royal BAM	3	150
Laing O'Rourke	1	125

Clients	Projects	£m
British Land	2	633
Endurance Land	1	300
Mitsubishi Estate	1	300
Co-re	1	250
MEC London Prop. 3	1	250
Southwark Charities	1	200
JTRE London	1	200
Havisham Sarl	1	200
HSBC Bank	4	169
Obayashi	1	165

Offices

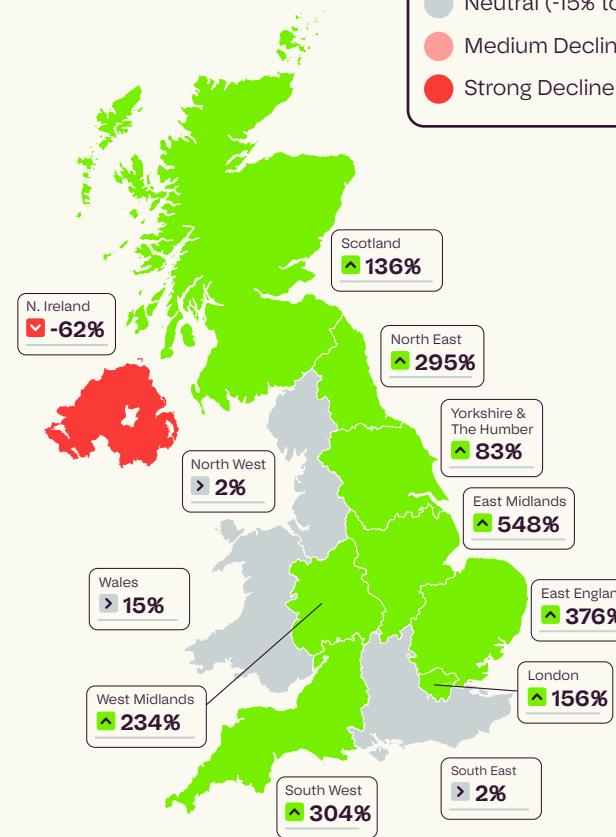
Regional

- Strong performance for project starts across the regions, with only one region down against last year.
- Only four regions experienced growth in detailed planning approvals.
- The East and West Midlands experienced strong growth in both project starts and planning approvals.

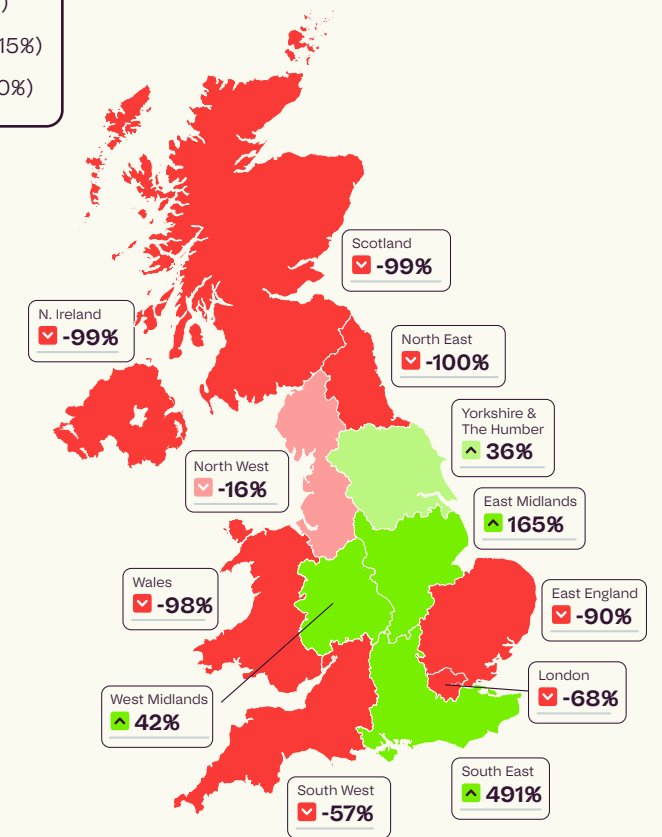
London had the highest share (74%) of project starts during the period, thanks to a 156% increase. Growth was boosted by the £250 million Panorama St Paul's fit-out in the City. Totalling £155 million, starts in the North West climbed 2% on a year ago, boosted by the £98 million The Republic at Mayfield development in Manchester.

The South East led detailed planning approvals, having jumped almost six times year-on-year to total £446 million. Activity in the region was mainly driven by the £259 million Iver Heath Data Park development. In contrast, London contracted 68% against 2024 to total £359 million.

Changes in Office Starts on a Year Earlier



Changes in Office Planning Approvals on a Year Earlier



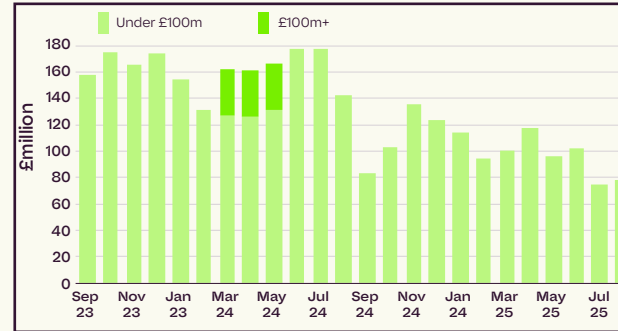
Retail

Overview

- ✓ **34% decrease** in project starts year-on-year.
- ✓ **69% decrease** in main contract awards from last year.
- ✓ **45% decrease** in detailed planning approvals compared to the previous year.

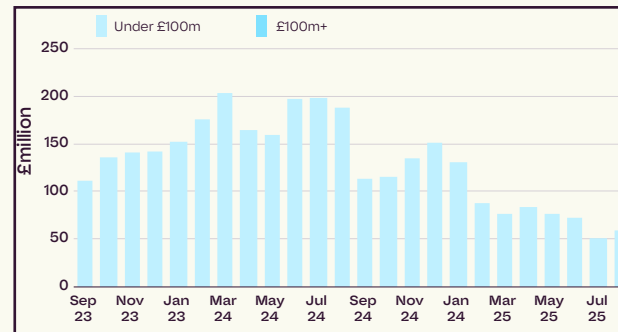
Performance in the retail sector continued a downward trajectory in the three months to August, with project starts, main contract awards and detailed planning approvals all down year-on-year. No major projects (over £100 million) reached any of the three stages in the development pipeline, with underlying projects (£100 million) all down both year-on-year and quarter-on-quarter.

Detailed Planning Approvals



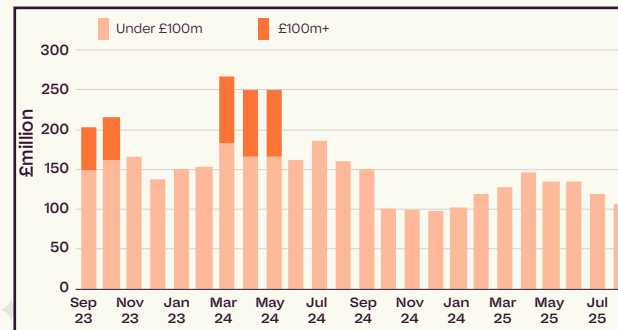
Source: Glenigan

Main Contract Awards



Source: Glenigan

Retail Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	234	-	234
YoY	-45%		-45%
Prev. 3 months	-19%		-19%
Prev. 3 months (SA)	-18%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	178	-	178
YoY	-69%		-69%
Prev. 3 months	-22%		-22%
Prev. 3 months (SA)	-26%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	321	-	321
YoY	-34%	-100%	-34%
Prev. 3 months	-21%	-100%	-21%
Prev. 3 months (SA)	-23%		

Retail

Types of projects started

Performance in the retail sector was very weak, with only two categories growing on a year ago.

- Supermarkets accounted for the largest share (63%) having increased 7% year-on-year to total £201 million.
- Totalling £18 million, petrol filling stations were 32% higher year-on-year.
- Totalling £85 million, shop projects starting on site decreased 57% on a year ago.

Types of Retail Projects Started

Three months to July 2025

	£ million	Percentage
Other Retail	2	1%
Petrol Filling Stations	18	6%
Retail Warehousing	6	2%
Shopping Centres	8	3%
Shops	85	27%
Supermarkets	201	63%
Total	321	100%

Project Spotlight

Dewsbury Market

Detailed plans have been approved for the £21 million Dewsbury Market development. A main contractor is yet to be appointed on the scheme, with work due to be completed in Q4 2027.

PROJECT ID: 21406812

IMAGE SOURCE: BDP

£21m



Retail League Tables

August 2024 to July 2025

Contractors	Projects	£m
Bowmer & Kirkland	1	43
Kier	1	41
McPhillips Wellington	1	37
DSP Construction	10	30
Mildren Construction	2	27
G F Tomlinson	1	23
B Team	7	22
Clark Contracts	5	22
One Group Const.	1	20
Speller Metcalfe	2	17

Clients	Projects	£m
Lidl UK	41	125
Aldi	44	84
Marks & Spencer	25	69
Walsall Met. BC.	2	52
T J Morris	12	42
McPhillips Wellington	1	37
Tesco	61	32
J Sainsbury	20	16
Marks and Spencer	1	14
MEPC Milton Park	1	14

Retail

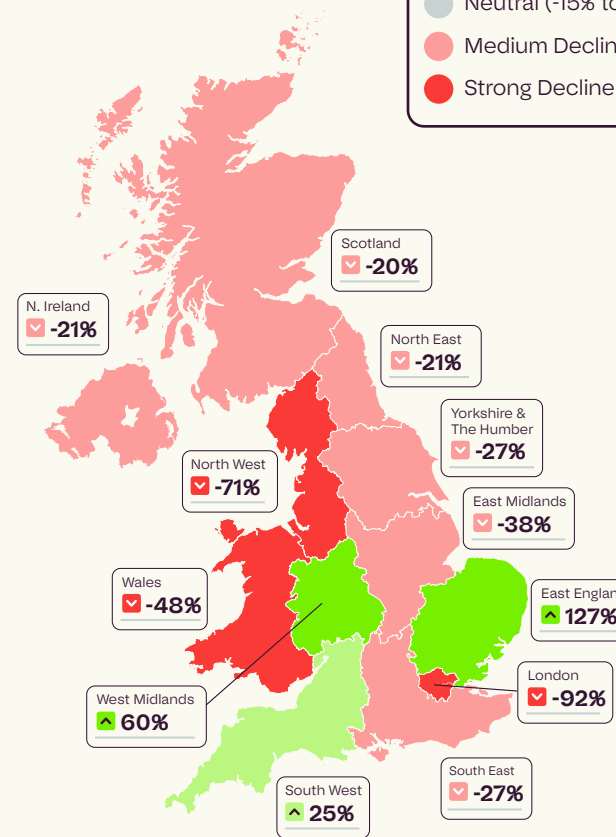
Regional

- Project starts and detailed planning approvals were down in most regions.
- The East of England and the West Midlands saw strong growth in project starts.
- Detailed planning approvals grew strongly in Yorkshire & the Humber and Wales.

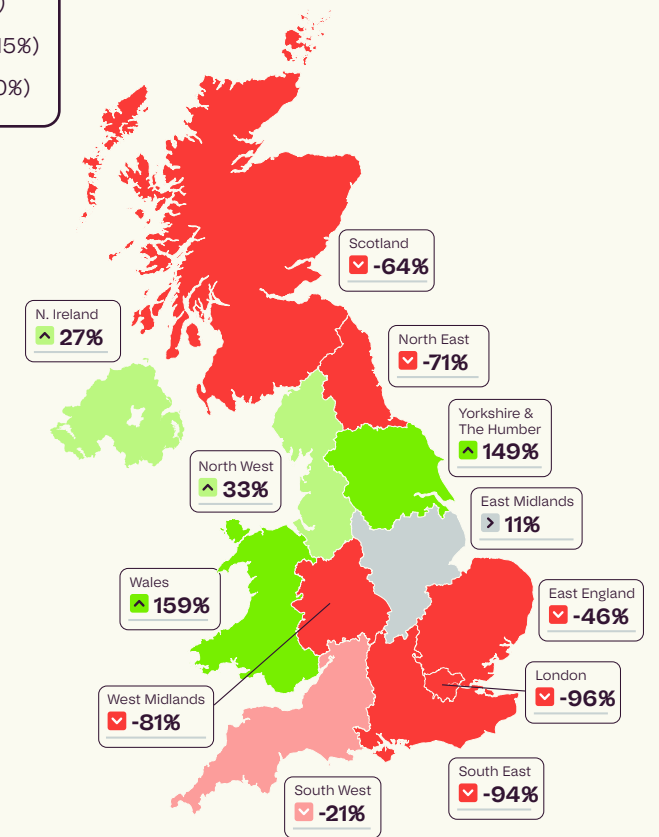
The South West dominated retail project starts, thanks to a 25% growth on a year ago. The region accounted for 18% at £59 million. The West Midlands increased 60%, totalling £56 million. Starts in the East of England totalled £26 million, having doubled on a year ago.

Totalling £43 million each, Yorkshire & the Humber and the North West led detailed planning approvals, having grown 149% and 33% on a year ago respectively. Wales also jumped 159% year-on-year to total £29 million. In contrast, totalling £26 million, the South West fell 21% against last year.

Changes in Retail Starts on a Year Earlier



Changes in Retail Planning Approvals on a Year Earlier



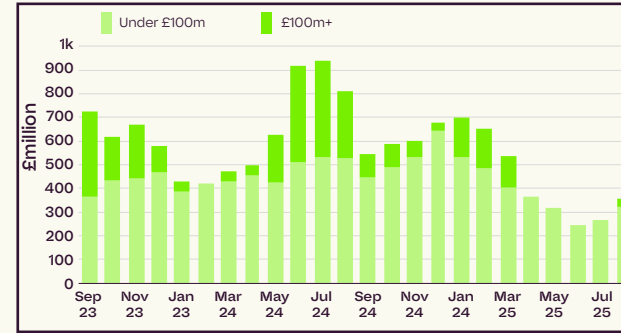
Hotel & Leisure

Overview

- ▲ **23% increase** in project starts year-on-year.
- ▼ **37% decrease** in main contract awards from last year.
- ▼ **56% decrease** in detailed planning approvals compared to a year ago.

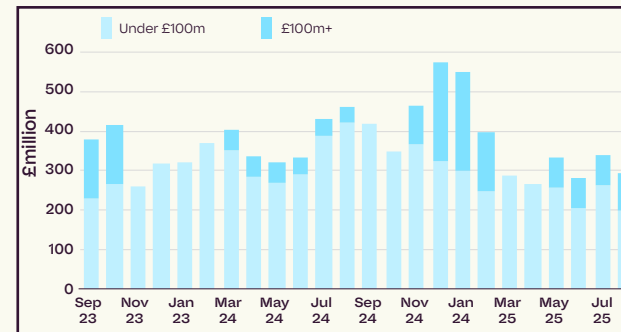
Project starts grew year-on-year driven by both underlying starts (under £100 million) and major starts (£100 million or more). However, projects in both value bands fell during the period, dragging down the quarterly performance.

Detailed Planning Approvals



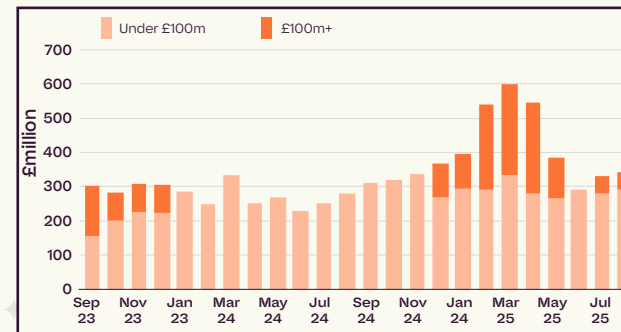
Source: Glenigan

Main Contract Awards



Source: Glenigan

Hotel & Leisure Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	967	100	1,067
YoY	-39%	-88%	-56%
Prev. 3 months	2%		12%
Prev. 3 months (SA)	-1%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	596	280	876
YoY	-53%	124%	-37%
Prev. 3 months	-23%	22%	-13%
Prev. 3 months (SA)	-42%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	874	155	1,029
YoY	4%		23%
Prev. 3 months	9%	-56%	-10%
Prev. 3 months (SA)	-5%		

Hotel & Leisure

Types of projects started

Sub-sector performance was strong, with most categories experiencing growth.

- Indoor leisure facilities accounted for the largest share (29%), having jumped 202% on a year ago to total £302 million.
- Accounting for 22%, sport facilities grew 41% year-on-year.
- Cinemas & theatres jumped almost five times against the previous year, accounting for a 21% share.

Types of Hotel & Leisure Projects Started

Three months to July 2025

	£ million	Percentage
Cafés, Restaurants, Fast-food outlets	50	5%
Cinemas & Theatres	217	21%
Hotels, Guest Houses	93	9%
Indoor Leisure Facilities	302	29%
Other Hotel & Leisure	139	14%
Sport Facilities	227	22%
Total	1,029	100%

Project Spotlight

Kings Hall Leisure Centre

Work has started on the £71 million Kings Hall Leisure Centre in Clapton. A main contractor is yet to be appointed on the scheme, with work due to be completed in Q2 2028.

PROJECT ID: 24296917

IMAGE SOURCE: HC

£71m



Hotel & Leisure League Tables

August 2024 to July 2025

Contractors	Projects	£m
Newarthill	3	319
Morgan Sindall	7	178
Pellikaan	4	158
McLaren	2	156
Bovis	1	100
Gilbert Ash	3	97
Legendre UK	1	82
BCEGI Construction	2	77
Tilbury Douglas	4	72
Robertson	1	69

Clients	Projects	£m
Marriott Int.	1	300
C1 Capital	1	225
Frogmore	1	225
Great. London Auth.	2	135
Crystal Palace FC.	1	100
Alliance Leisure Serv.	6	83
Fc100	1	82
Csg Queensferry	1	50
The Property Trust	1	49
Whitbread	7	49

Hotel & Leisure

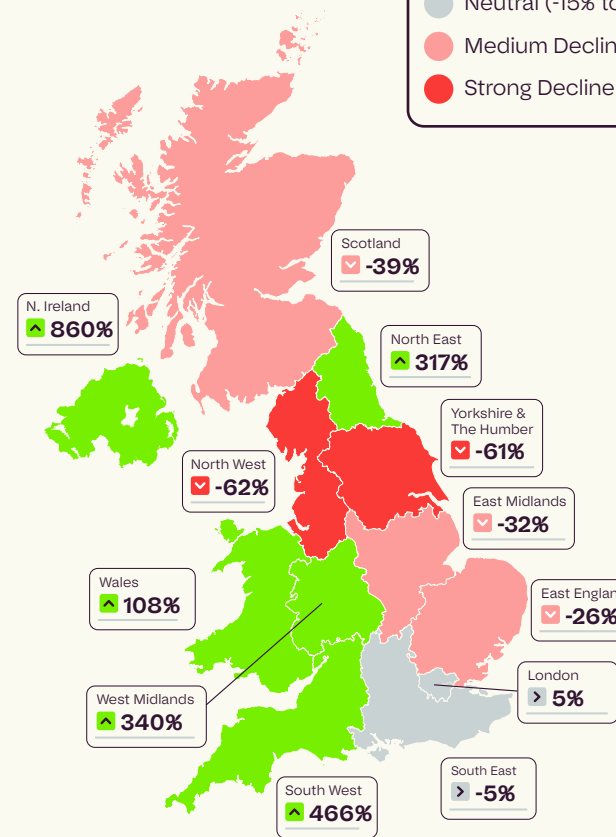
Regional

- Regional performance in project starts was mixed.
- Most regions saw a decline in detailed planning approvals.
- The South West and the West Midlands grew in both starts and approvals.

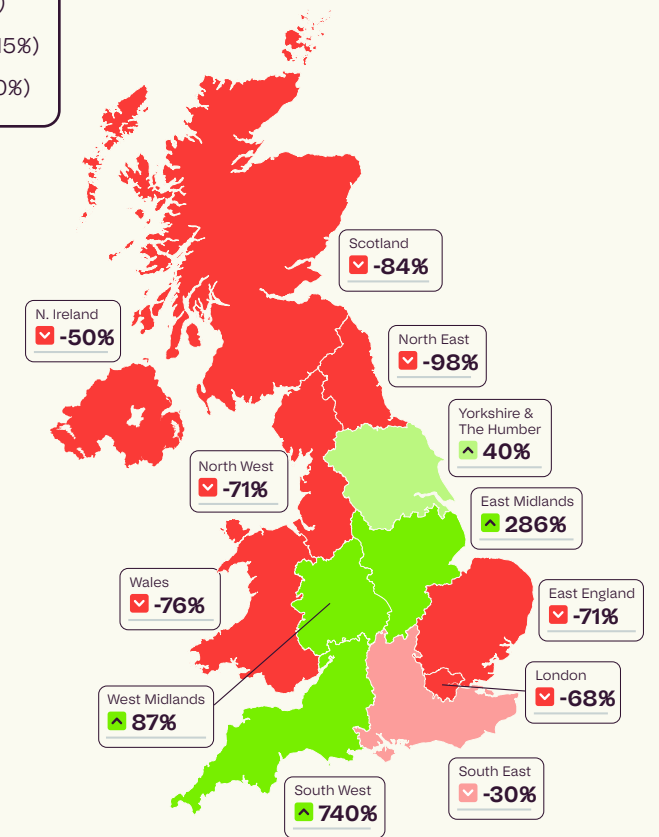
The South West led hotel & leisure project starts, having grown 466% year-on-year to total £242 million. Activity in the region was boosted by the £155 million YTL Arena Bristol Brabazon development. London climbed 5% to total £181 million. In contrast, accounting for 11%, the South East fell 5% on a year ago to total £117 million.

London dominated detailed planning approvals, despite a 68% decline on the previous year. The region totalled £316 million and accounted for 30%. Totalling £135 million, the South East fell 30% against last year. In contrast, the South West jumped more than eight times to total £143 million.

Changes in Hotel & Leisure Starts
on a Year Earlier






Changes in Hotel & Leisure Planning Approvals
on a Year Earlier



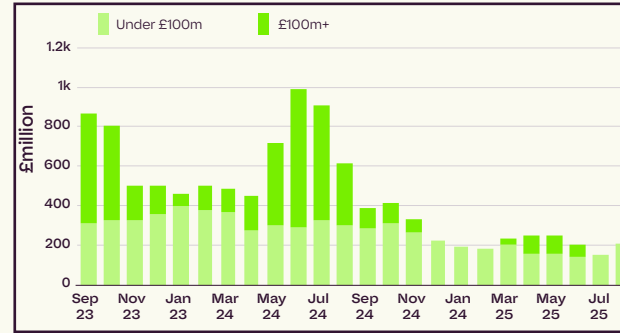
Health

Overview

-  **9% decline** in project starts against the preceding three months.
-  **13% decline** in main contract awards against the previous year.
-  **17% decrease** in detailed planning approvals compared to the preceding three months.

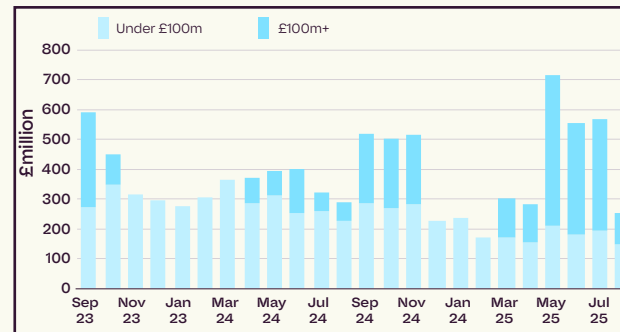
The health sector experienced a poor period in the three months to August. Project starts, main contract awards and detailed planning approvals all declined against the preceding three months and the previous year.

Detailed Planning Approvals



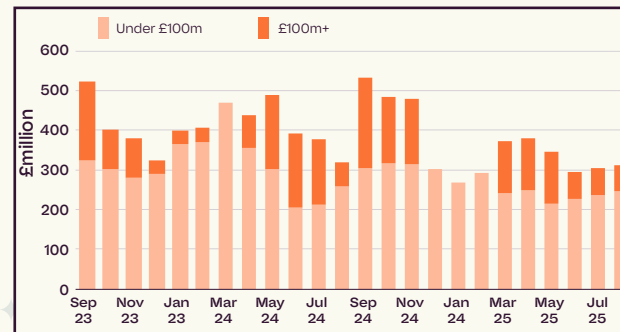
Source: Glenigan

Main Contract Awards



Source: Glenigan

Health Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	627	-	627
YoY	-31%	-100%	-66%
Prev. 3 months	33%	-100%	-17%
Prev. 3 months (SA)	6%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	447	315	762
YoY	-34%	66%	-13%
Prev. 3 months	-29%	-79%	-64%
Prev. 3 months (SA)	-9%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	740	201	941
YoY	-5%	9%	-2%
Prev. 3 months	14%	-48%	-9%
Prev. 3 months (SA)	7%		

Health

Types of projects started

The health sector experienced a poor performance compared to the previous year.

- Nursing Homes accounted for a 42% share having grown 132% to total £399 million.
- Totalling £57 million, the value of Dental, Health & Veterinary Centres/ Surgeries starting on site declined 56% on a year ago.
- Hospitals experienced a 78% decline against the previous year to total £73 million, an 8% share of the total value.

Types of Health Projects Started

Three months to July 2025

	£ million	Percentage
Day Centres	4	0%
Dental, Health & Veterinary Centres/ Surgeries	57	6%
Hospitals	73	8%
Nursing Homes & Hospices	399	42%
Other Health	407	43%
Total	941	100%

Project Spotlight

The Watermark

Work has started on The Watermark luxury retirement development in Richmond upon Thames. McAleer & Rushe has been appointed as main contractors on the £42.7 million scheme, with work expected to be completed in Q2 2027.

PROJECT ID: 18363720

IMAGE SOURCE: MARCHESE PARTNERS INTERNATIONAL PTY LTD

£42.7m



Health League Tables

August 2024 to July 2025

Contractors	Projects	£m
Laing O'Rourke	3	1,619
Graham Construction	3	415
Mace	2	286
McLaughlin & Harvey	4	216
Bouygues UK	1	215
Bowmer & Kirkland	4	125
Morgan Sindall	10	117
Kier	8	87
VINCI Construction	4	75
Kori Construction	4	58

Clients	Projects	£m
Dep. of Health	136	1,728
Dep. for Environ.	3	927
CPD	3	206
Nat. History Museum	1	201
Lab. of Research Council	1	85
John Innes Centre	2	75
Univ. of Cambridge	1	72
MBDA (UK)	1	59
Univ. of Birmingham	1	50
LNT Group	6	45

Health

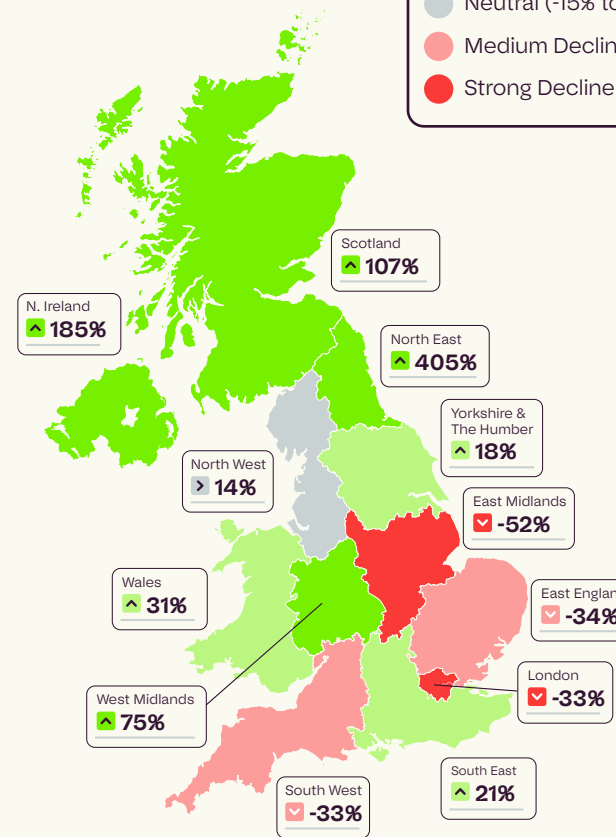
Regional

- The South East accounted for the largest share of project-starts, with a strong performance against the previous year.
- The North East experienced sharp growth in project-starts.
- The South East accounted for the largest share of approvals but experienced a decline against the previous year.

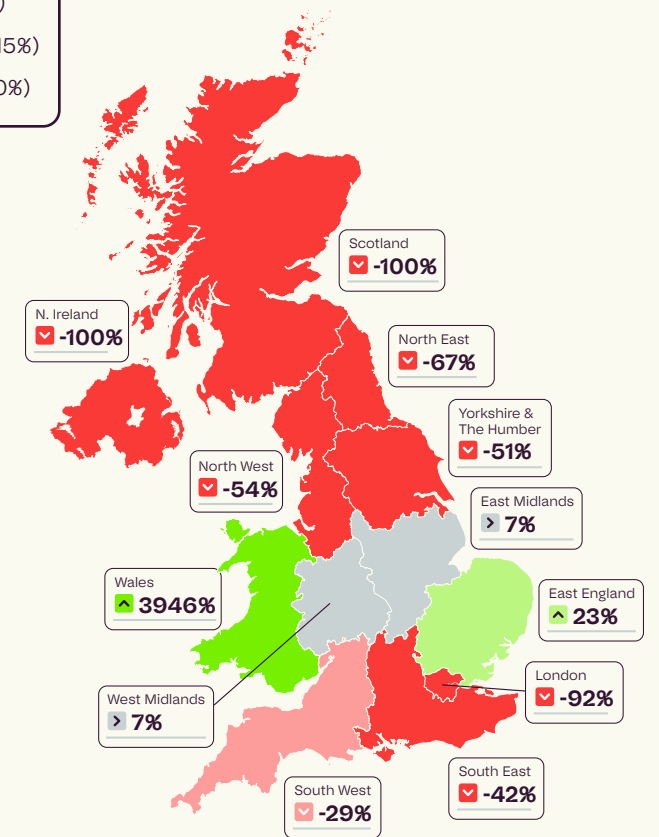
The South East, at £337 million, was the most active region for project starts, accounting for 36% of the total, with the region rising 21% against the previous year. The North East of England at £42 million experienced sharp growth, rising 405% against the previous year to account for 4% of the total value.

In planning approvals, the South East accounted for the largest share of approvals (34%), however declined 42% against the previous year. The East of England, at £154 million, accounted for the largest share of approvals at 24%, rising 23% against the previous year.

Changes in Health Starts
on a Year Earlier



Changes in Health Planning Approvals
on a Year Earlier



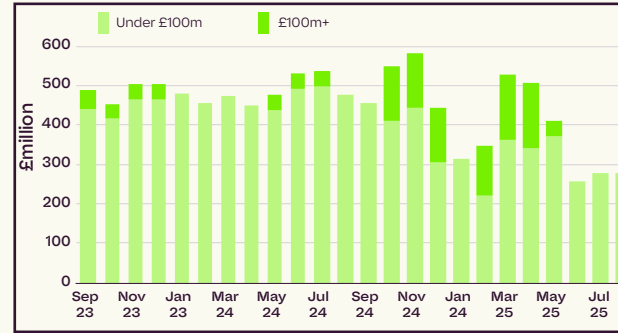
Education

Overview

- ▼ **4% decline** in project starts against the preceding three months.
- ▲ **18% increase** in main contract awards against the preceding three months.
- ▼ **32% decrease** in detailed planning approvals compared to the preceding three months.

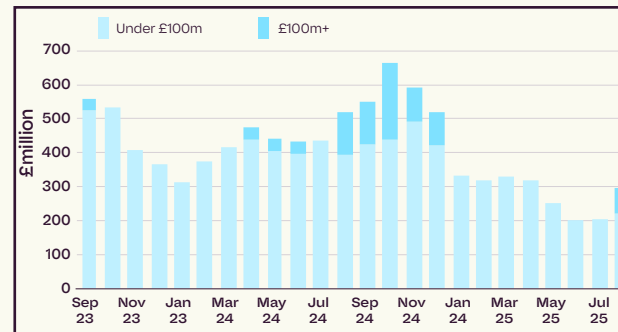
The education sector experienced a mixed three months to August. Main contract awards increased against the preceding three months but remained below the previous year's levels. Elsewhere, detailed planning approvals and project starts declined on both periods.

Detailed Planning Approvals



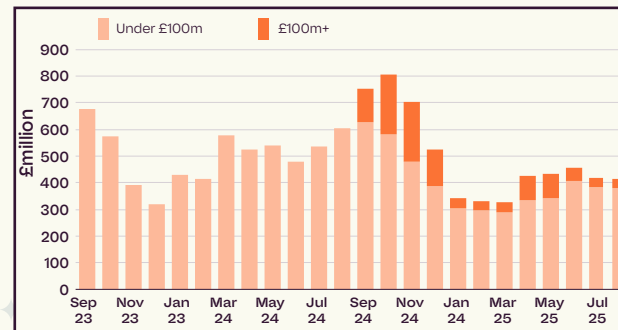
Source: Glenigan

Main Contract Awards



Source: Glenigan

Education Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	841	-	841
YoY	-41%		-41%
Prev. 3 months	-24%	-100%	-32%
Prev. 3 months (SA)	-18%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	668	220	888
YoY	-44%	-41%	-43%
Prev. 3 months	-12%		18%
Prev. 3 months (SA)	-11%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,138	103	1,241
YoY	-37%		-32%
Prev. 3 months	10%	-62%	-4%
Prev. 3 months (SA)	-14%		

Education

Types of projects started

Project starts in the education sector experienced a poor performance, with all segments declining against the previous year.

- Schools, at £942 million, accounted for the largest share of starts (76%) while declining 13% against the previous year.
- Colleges, at £224 million, accounted for the second largest share of starts (18%), but declined 54% against the previous year.
- Universities declined 74% against the previous year to total £52 million.

Types of Education Projects Started

Three months to July 2025

	£ million	Percentage
Colleges	224	18%
Other Education	23	2%
Schools	942	76%
Universities	52	4%
Total	1,241	100%

Project Spotlight

Ardrossan Community Learning and Innovation Hub

Work has started on the £103 million Ardrossan Community Learning and Innovation Hub in Strathclyde. Work is set to be completed in Q4 2027.

PROJECT ID: 19316053

IMAGE SOURCE: JM ARCHITECTS

£103m



Education League Tables

August 2024 to July 2025

Contractors	Projects	£m
Morgan Sindall	38	438
Kier	23	426
Multiplex	1	300
Tilbury Douglas	18	214
Bowmer & Kirkland	12	210
Royal BAM	9	209
Willmott Dixon	14	189
Galliford Try	18	157
McLaren	2	114
Graham	4	104

Clients	Projects	£m
Dep. for Education	72	662
Univ. of Glasgow	2	301
Midlothian Council	3	163
University of London	9	115
Educ. Auth. N. Ireland	10	114
Edinburgh Council	7	79
Aberdeenshire Council	3	75
Rhondda Cynon Taf.	9	72
Kent CC.	7	71
Scot. Borders Council	1	57

Education

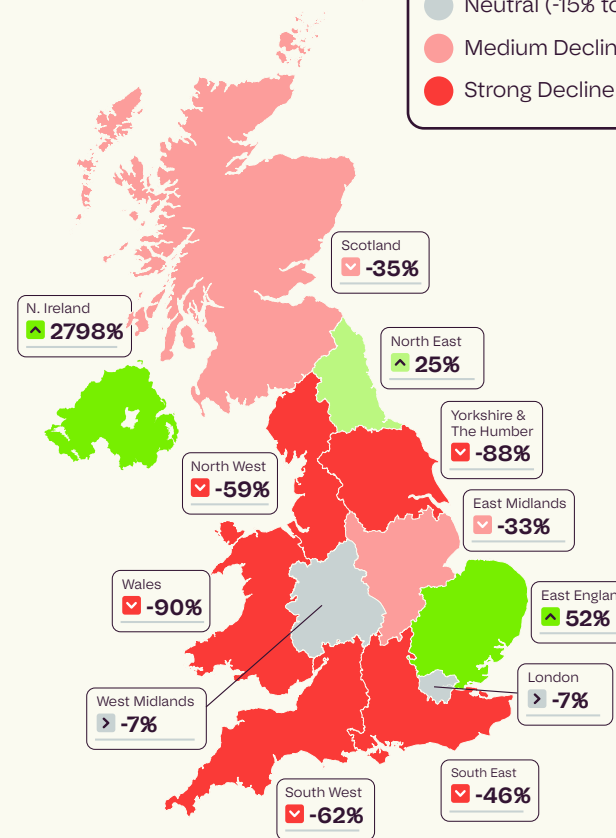
Regional

- Scotland accounted for the largest share of sector starts, but declined against the previous year.
- Scotland also accounted for the largest share of sector approvals, while also experiencing a decline against the previous year.
- Northern Ireland experienced sharp growth for project starts.

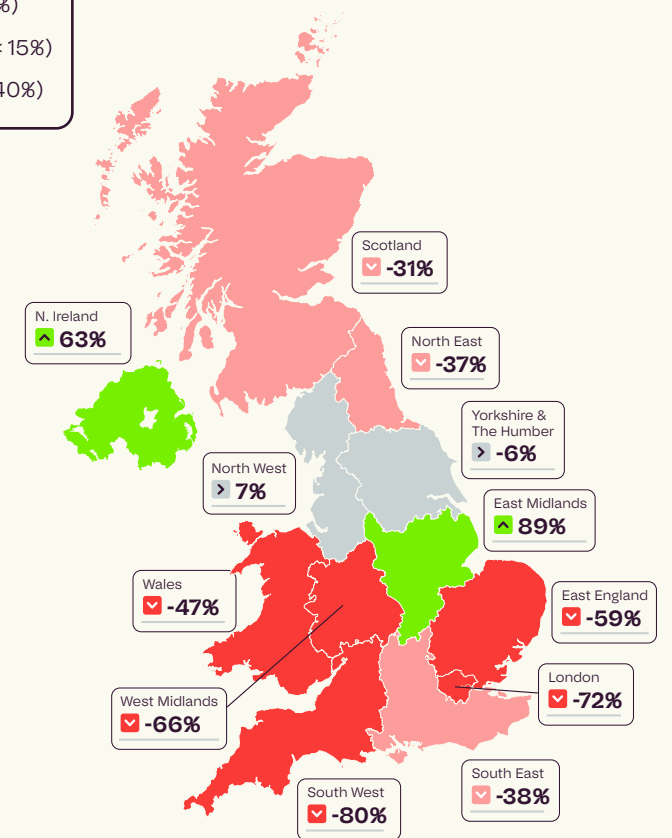
Scotland, at £231 million, was the most active region for project starts accounting for 19% of the total value but declined by 35% against the previous year. Northern Ireland, at £196 million, experienced a strong period, increasing 29 times against the previous year to account for 8% of the total value.

In planning approvals, Scotland accounted for the largest share of approvals (13%), but declined 31% against the previous year to total £111 million. Elsewhere, the East Midlands accounted for 10% of the total value, an 89% increase against the previous year to total £81 million.

Changes in Education Starts on a Year Earlier



Changes in Education Planning Approvals on a Year Earlier



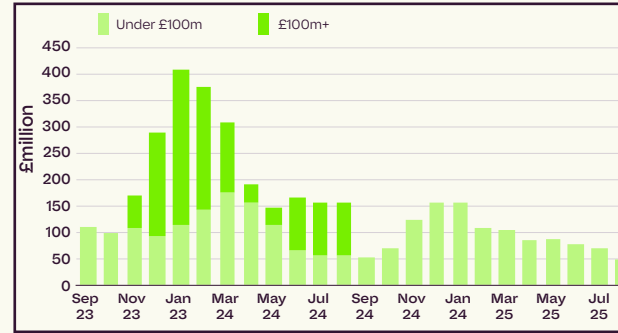
Community & Amenity

Overview

- ▲ **30% increase** in project starts year-on-year.
- ▲ **120% increase** in main contract awards from last year.
- ▼ **69% decrease** in detailed planning approvals compared to 2024.

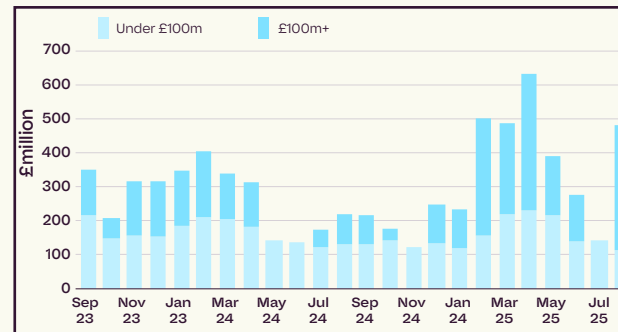
The community & amenity sector experienced a mixed performance. Project starts, and detailed planning approvals were down quarter-on-quarter. No major projects (over £100 million) were approved. However, contract awards grew against last year and the previous quarter, driven by a strong increase in major projects.

Detailed Planning Approvals



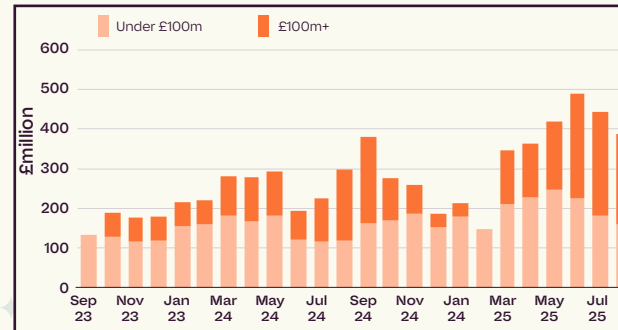
Source: Glenigan

Main Contract Awards



Source: Glenigan

Community & Amenity Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	143	-	143
YoY	-15%	-100%	-69%
Prev. 3 months	-45%		-45%
Prev. 3 months (SA)	-32%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	340	1,103	1,443
YoY	-14%	324%	120%
Prev. 3 months	-47%	109%	23%
Prev. 3 months (SA)	-41%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	480	684	1,163
YoY	35%	27%	30%
Prev. 3 months	-35%	33%	-7%
Prev. 3 months (SA)	-26%		

Community & Amenity

Types of projects started

Reflecting the overall decline in the sector, only three sub-sectors saw growth in project starts.

- Prisons accounted for the largest share (78%), thanks to a 46% jump to £907 million.
- Blue light projects totalled £58 million, 133% up year-on-year.
- Local facilities fell 23% on a year ago, totalling £125 million.

Types of Community & Amenity Projects Started

Three months to July 2025

	£ million	Percentage
Blue Light	58	5%
Government Buildings	54	5%
Law Courts	-	0%
Local Facilities	125	11%
Military	2	0%
Places of Worship	17	1%
Prisons	907	78%
Total	1,163	100%

Project Spotlight

Peterhead Cultural Quarter

Detailed plans have been approved for the Peterhead Cultural Quarter development. A main contractor is yet to be appointed on the £24 million scheme, with work due to be completed in Q2 2027.

PROJECT ID: 22303410

IMAGE SOURCE: ARCHITECTS JOURNAL

£24m



Community & Amenity League Tables

August 2024 to July 2025

Contractors	Projects	£m
Kier	20	1,176
Mace	1	700
Wates	13	379
Laing O'Rourke	3	310
Bowmer & Kirkland	3	192
Galliford Try	12	117
Tilbury Douglas	5	108
Willmott Dixon	5	83
Goldbeck Bower	1	78
John Sisk & Son	1	54

Clients	Projects	£m
Ministry of Justice	29	1,003
The British Library	1	700
Scot. Prison Service	4	685
Ministry of Defence	23	554
UK Parliament	1	111
Gov. Property Agency	1	105
HMRC	2	85
Reuben Brothers	1	83
Sandwell Met. BC.	3	81
Cardiff CC.	1	78

Community & Amenity

Regional

- Project starts performance across the regions was mixed, with six regions up on a year ago.
- Detailed planning approvals were down in most regions.
- Starts and approvals grew strongly in the North East and North West.

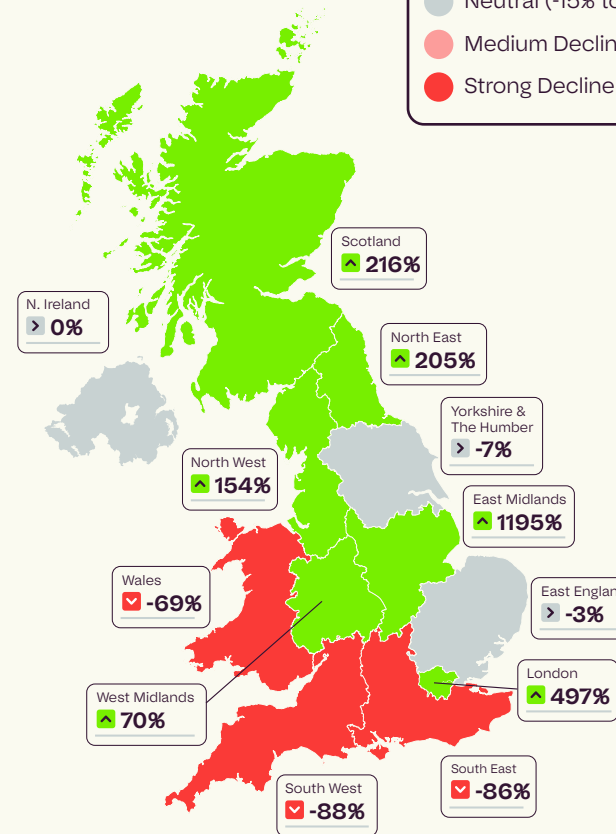
Scotland accounted for the highest share of project starts, having grown more than three times to total £721 million. Activity in the region was boosted by the £683 million HMP Glasgow development.

The North West led with 36% of planning approvals, rising 90% year-on-year to £52 million. The South East took a 23% share, tripling to £34 million, while Scotland fell 8% to £37 million.

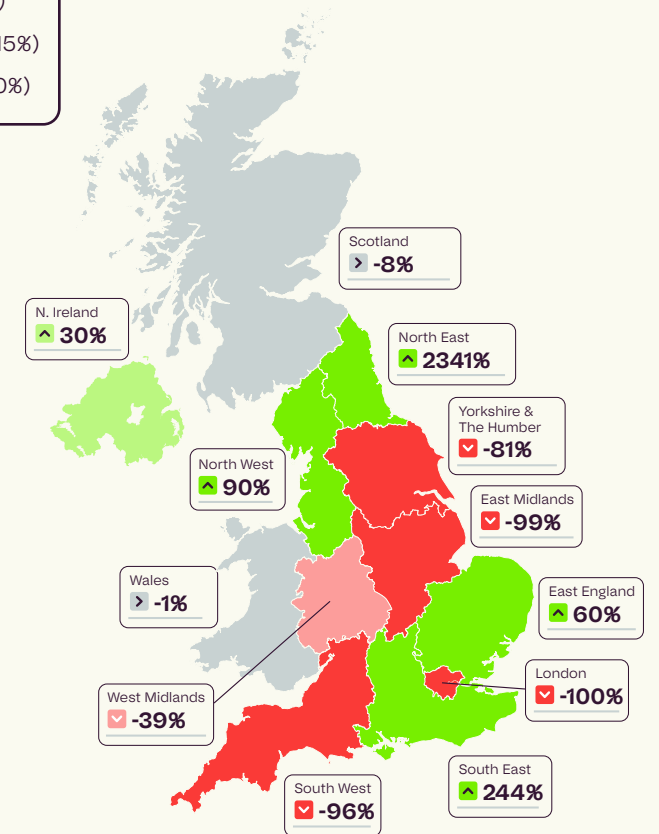
Changes in Community & Amenity Starts on a Year Earlier

Growth or Decline

- Strong Growth (> 40%)
- Medium Growth (> 15%)
- Neutral (-15% to 15%)
- Medium Decline (< 15%)
- Strong Decline (< 40%)



Changes in Community & Amenity Planning Approvals on a Year Earlier



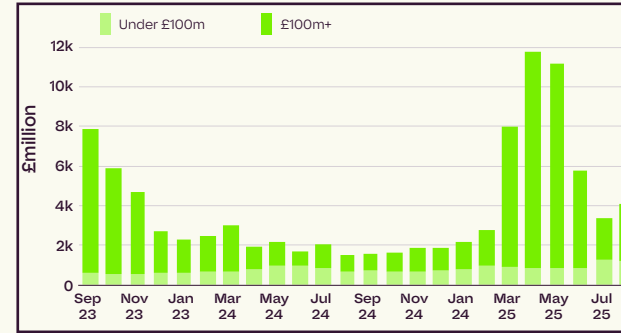
Civil Engineering Overview

- ▼ **63% decline** in project starts against the preceding three months.
- ▼ **19% decline** in main contract awards against the previous year.
- ▲ **171% increase** in detailed planning approvals compared to the previous year.

Project starts and main contract awards declined on both periods. Planning approvals weakened against the preceding three months but rose sharply against the previous year.

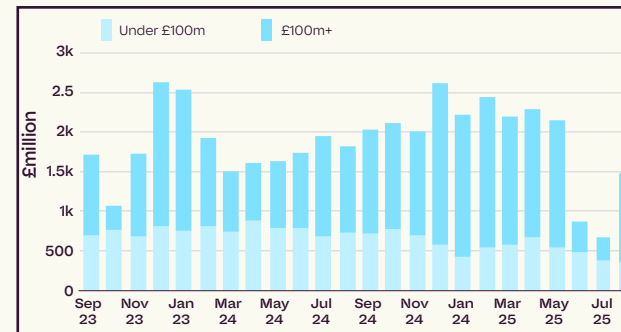
Despite the decline in approvals against the preceding three months, underlying figures (under £100 million) were positive, rising 72% against the preceding three months (SA).

Detailed Planning Approvals



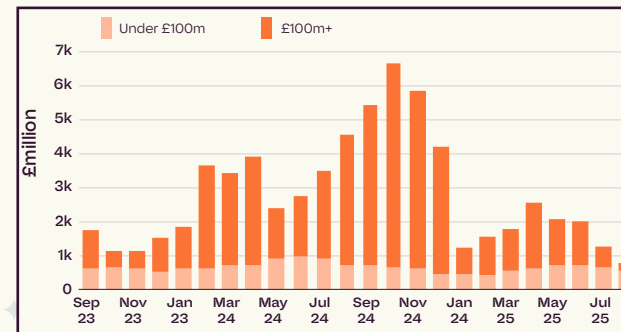
Source: Glenigan

Main Contract Awards



Source: Glenigan

Civil Engineering Starts



Source: Glenigan

Change year on year and 3 months earlier

Detailed Planning Approvals	Under £100m	£100m+	Total
£ million	3,655	8,563	12,218
YoY	78%	248%	171%
Prev. 3 months	40%	-72%	-63%
Prev. 3 months (SA)	72%		

Change year on year and 3 months earlier

Main Contract Awards	Under £100m	£100m+	Total
£ million	1,048	3,383	4,431
YoY	-52%	3%	-19%
Prev. 3 months	-36%	-30%	-31%
Prev. 3 months (SA)	-13%		

Change year on year and 3 months earlier

Starts	Under £100m	£100m+	Total
£ million	1,671	618	2,289
YoY	-22%	-95%	-83%
Prev. 3 months	-23%	-85%	-63%
Prev. 3 months (SA)	2%		

Civil Engineering

Types of projects started

Performance across all segments in the sector was poor, with five out of seven sectors declining against the previous year.

- Roads accounted for £478 million of starts, representing a 21% share, but activity fell 44% year-on-year.
- The water sector totalled £447 million, a 20% share, doubling compared with last year.
- Harbours and ports reached £324 million, rising 420% year-on-year.

Types of Civil Engineering Projects Started

Three months to July 2025

	£ million	Percentage
Airports	88	4%
Other Civils	540	24%
Rail	69	3%
Roads	478	21%
Harbours/Ports	324	14%
Energy	293	13%
Water Industry	447	20%
Waste	51	2%
Total	2,289	100%

Project Spotlight

Cardiff Central Station Upgrade

Detailed plans have been approved for the £140 million Cardiff Central Station Upgrade development. A contractor is yet to be appointed on the scheme, with work expected to be completed in Q3 2028.

PROJECT ID: 20335033

IMAGE SOURCE: NEW CIVIL ENGINEER

£140m



Civil Engineering League Tables

August 2024 to July 2025

Contractors	Projects	£m
STRABAG	5	2,900
Royal BAM	18	2,000
Balfour Beatty	37	1,690
Ferrovial	3	1,617
Ringway	3	1,159
M GROUP Services	10	921
Costain	4	859
Siemens	7	653
Downing LLP	15	568
Graham Constr.	8	471

Clients	Projects	£m
Dep. for Transport	49	4,812
United Utilities	5	2,900
SSEN Transmission	12	2,053
Hertfordshire CC.	1	1,155
Oxfordshire CC.	3	988
National Grid	5	718
GE Hitachi Nucl. En.	1	500
Kingsway Solar Farm	1	500
Kemble Water	4	420
Kent CC.	3	415

Civil Engineering

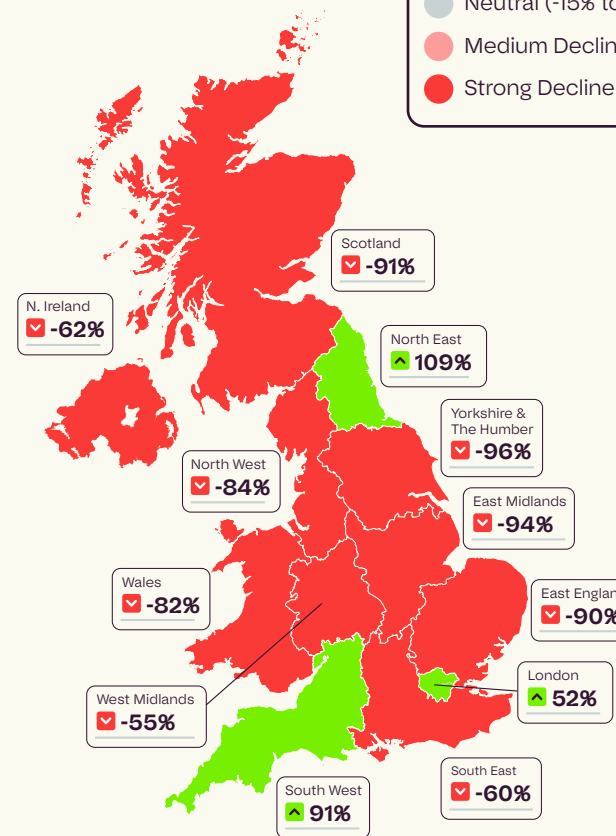
Regional

- The South West accounted for the largest share of sector starts, with growth compared with the previous year.
- Wales had the largest share of sector approvals and recorded the sharpest growth.
- The North West also saw strong growth in planning approvals.

The South West was the most active region for project starts, accounting for £518 million or 23% of the total, and saw a 91% increase compared with the previous year. The North East saw the strongest growth in project starts, rising 109% year-on-year to £176 million.

Wales accounted for the largest share of approvals at 25%, with total approvals rising to £3,014 million, reflecting four-digit growth year-on-year. The North West held the second largest share at 22%, increasing 423% to £2,735 million compared with the previous year.

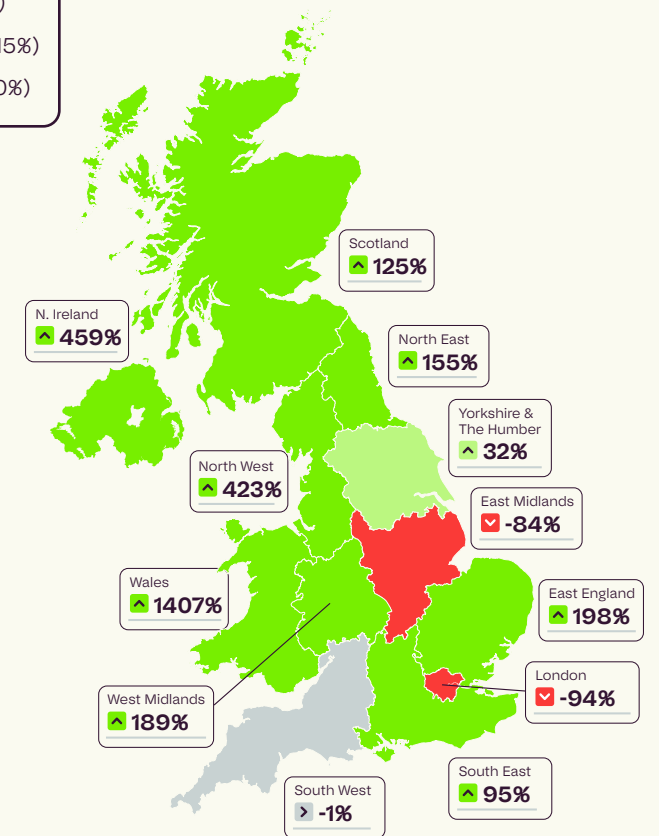
Changes in Civil Engineering Starts on a Year Earlier



Growth or Decline

- Strong Growth (> 40%)
- Medium Growth (> 15%)
- Neutral (-15% to 15%)
- Medium Decline (< 15%)
- Strong Decline (< 40%)

Changes in Civil Engineering Planning Approvals on a Year Earlier





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